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TRADE OF

# TIENTSIN

FOR THE YEARS 1900-03.

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DIPLOMATIC AND CONSULAR REPORTS.

# CHINA.

## NOTES

ON THE

## FOREIGN TRADE OF TIENTSIN DURING THE YEARS 1900-03.

REFERENCE TO PREVIOUS REPORT, Annual Series No. 2487.

*Presented to both Houses of Parliament by Command of His Majesty, MARCH, 1904.*

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*Reference to previous Report, Annual Series No.* 2487.

*Notes on the Foreign Trade of Tientsin for the Years* 1900-03 *by Mr. J. W. Jamieson, Commercial Attaché to H.M.'s Legation at Peking.*

(Shanghai, January 9, 1904; received at Foreign Office, February 16, 1904.)

Prefatory note.

The last report on the trade of Tientsin was despatched just before the troubles in connection with the Boxer outbreak came to a head, and the great pressure of work thrown on the shoulders of the Consular staff, in consequence of its having to grapple with the many complications arising out of a new condition of things when order was finally restored, has rendered the compilation of one in the interval a matter of impossibility.

The following notes, collected in the course of a visit to Tientsin in December, 1903, are intended to give some idea of the great changes which have taken place at that port during the last three years, and to form a point of departure for future reports drawn up in the orthodox manner.

The writer has not been stationed in Tientsin since 1892, and it is, in the nature of things, not easy for a non-resident fully to grasp the situation presented by the new state of affairs. The opinions with which he was furnished were so divergent that the conclusions drawn are likely to be open to criticism. Points of interest may have been overlooked, nor can freedom from error be guaranteed. It is hoped, therefore, that any shortcomings or inaccuracies which may strike those on the spot will not be treated with undue severity. It should be added that the trade statistics for 1903 are incomplete.

General importance of Tientsin as a trade centre.

As was pointed out in the report for 1899, Tientsin's geographical position has for years past made it the second port in China. The value of its total trade is only surpassed by that of the port of Shanghai, and the net total of its foreign imports exceeds that of Shanghai. Until it received the disastrous set back of 1900, its commercial prosperity had been growing steadily since 1888; and, after two years of depression, it in 1902 fully recovered itself—the sterling value of the trade in that year being only 8,000*l.* behind that of 1899, whereas the silver value was far greater.

Effect of military operations.

The two intermediate years were those of the troubles and their aftermath. The Chinese authorities lost control of the city on June 4, 1900. On the 17th began the bombardment of the European concessions, which was followed by the military operations connected with their relief and that of the Legations, and with the restoration of order throughout the prvoince. Of the European concessions the French suffered most; one-fourth of the native houses were destroyed, two-thirds of the population fled—4,000 to 5,000 is the estimate of the loss of life—and of treasure 40,000,000 to 50,000,000 taels are said to have been carried off. Large seizures of land, houses and private property were made; and for months innocent and guilty alike suffered the full penalty of the misdeeds of the misguided fanatics, who thought that they could sweep the foreigner into the sea. The interior of the province of Chihli was over-run by punitive expeditions and marauding bands of natives, and organised government practically ceased. The first attempt to evolve order out of chaos was made by the Allied Powers, who introduced a form of provisional government for the cities of Peking and Tientsin, the government of the latter remaining in power until August 15, 1902.

The Tientsin provisional government.

The members of the International Executive deserve the highest praise for the excellent work they did, and for the many and great improvements which they effected. Commencing, so to speak, with a clean slate, they were in a position to plan and carry out reforms, which, under normal conditions, would have met with most formidable opposition. By the clearing away of the débris of ruined buildings, new arteries of communication were opened up, and after the artillery-battered walls were pulled down, fine wide streets took their place. The taxes imposed were wisely expended in the institution of public works of permanent benefit. Sanitary and police regulations are being enforced in a way which obtains nowhere else in China. The city has its own supply of pure water, and an intelligent system of draining low-lying ground, previously constantly flooded in the summer months, is in operation.

Fears were entertained that the resumption of Chinese jurisdiction would mean a return to old methods. These apprehensions have proved groundless, as the enlightened policy of the present Governor-General, His Excellency Yüan Shih-k'ai, has for its object the continuance and development of his immediate predecessor's schemes. He has laid out a large area to the north-east of the city, connected with the railway line by a broad road, bringing the railway-borne traffic in more direct communication with the centre of native trade, and steps are being taken to secure a convergence of the junk-borne traffic round to the same locality. Begging has ceased to be the pleasant and lucrative pastime it once was, as the sturdy beggar is at once arrested, given a distinctive uniform, and set to work on the road.

Settlement extension.

While the transition stage has enabled the extension of settle-

# TIEN-TSIN IN 1903.

(250 7/1904 S&B)

ments to be made in the city itself, it has also afforded splendid opportunities to the Foreign Powers—formerly without settlements—to acquire quasi-territorial rights, and to previous holders of the same largely to extend their boundaries. Prior to June, 1900, the following was the area of the then existing concessions and settlements :—

| Nationality. | Area. | |
|---|---|---|
| | Original. | Extension. |
| | Acres. | Acres. |
| British .. .. .. .. | 63·73 | 235·21 |
| American .. .. .. .. | 31·86 | .. |
| French .. .. .. .. | 141 | .. |
| German .. .. .. .. | 39 | .. |

Since then to the above have to be added :—

| Nationality. | Extension. |
|---|---|
| | Acres. |
| British .. .. .. .. .. | 569* |
| German .. .. .. .. .. | 524 |
| French .. .. .. .. .. | 212 |
| Japanese .. .. .. .. .. | 1,030 |
| Russian .. .. .. .. .. | 891 |
| Belgian .. .. .. .. .. | 320 |
| Austro-Hungarian .. .. .. .. | 190 |
| Italian .. .. .. .. .. | 124 |

* Extra mural.

*Explanation of Sketch of Tientsin in* 1903.

1. Chinese city (walls pulled down to form roads). 2. British original concession. 3. British extension (settlement). 4. British extension (extra mural). 5. American concession. 6. French concession. 6A. French extension. 7. German settlement. 7A. German extension. 8. Japanese settlement. 8A. Japanese extension. 8B. Japanese additional extension (8A and 8B administered by the Chinese Government). 9. Italian settlement. 10. Austro-Hungarian settlement. 11. Russian settlement. 12. Belgian settlement (not occupied). 13. Railway station (Tientsin settlement). 14. Railway station (Tientsin city). 15. Hai ho. 16. Proposed Russian bridge. 17. International bridge. 18. Yamen of the Governor-General. 19. Iron bridge. 21. East Arsenal (French barracks).

From the accompanying sketch it will be seen that the whole river front, with the exception of a narrow tract between the city and the river, has passed under foreign control, and that thereby all present and future landing facilities for direct sea-going traffic

are placed in foreign hands. Communication between the two sides of the river has to be maintained by numerous bridges, and at times the congestion of traffic is very great. A scheme is accordingly under consideration to deepen an existing canal which branches off from the river below the settlements, and which, running to the west or back thereof, connects with the Grand Canal on the north. It is hoped by means of this improved waterway to divert the junk traffic from the main river, to release it from foreign interference and to bring it in closer touch with the city.

Leaving aside for the moment the older British and French concessions, the most rapid progress in the matter of development is being made on the Japanese settlement, which has grown in a very short space of time into a prosperous semi-Chinese quarter. Certain sections of the northern part and the whole of the part below the German settlement remain, for the time being, under Chinese jurisdiction, until the Japanese are prepared to take them up. Similar activity is not characteristic of the other settlements, although the advantageous position of the Russian, which lies opposite to the German settlement and the British and French concessions, between the railway line and the river, gives great promise for the future. The river front of the German settlement has been carefully bunded, and, being nearer the sea, it will no doubt eventually prove a serious rival to the British river front, along which all shipping at present lies and which constitutes the great centre of trade.

In addition to the ordinary native boat bridges across the Pei-ho, which from the city to the sea is commonly spoken of as the Hai-ho, there are two iron swing bridges spanning the river; and, when unanimity as to specifications shall have been arrived at, a third will be thrown across joining the American and Russian concessions. Of the two others, one (Chinese) is opposite to the Yamen of the Governor-General, and the other (International) opposite to the lower railway station.

British municipalities.

Great strides have been made in re-building and re-occupying the French concession, and handsome residential quarters are springing up on the German settlement; but the best proof of the growing wealth and importance of Tientsin is afforded by a study of the figures in the reports of the British municipalities. The original concession granted by the Chinese Government to the British crown after the conclusion of hostilities in 1860 is situated at Tzu-chu-lin, where the trade of the port was created and fostered, and where 98 per cent. of it is still being carried on. Its area having proved too circumscribed for the increasing needs of the community, arrangements were made in 1897 for the setting apart of a tract of land to the back thereof, under the usual conditions governing settlements at the open ports. After 1900 the boundaries of this extra concession, as it is erroneously designated, were still further extended in order to provide for the requirements of the future. These three tracts of land are administered by municipal councils.

under the supervision of His Majesty's representatives in China ; but the constitution of each differs from the other, and an unification of the methods of administration, were it possible to obtain such, would obviate many inconveniences. The original concession, a strip of riparian frontage 3,400 by 810 feet, was let out in lots by the Crown on 90 years' leases, and no Chinese were allowed to hold land thereon. These leases expire about 1950, and an assurance that on expiry vested interests will receive due consideration is eagerly desired by present holders. Its main sources of revenue were bundage and mooring fees, chargeable on all vessels entering the port ; and the steady development of trade brought about a corresponding increase of income. Surplus revenue was from time to time invested by the municipality in what is now the extra settlement, and the property thus acquired was, after having been filled in and generally improved, disposed of on the Scotch feuage system, *i.e.*, sale by auction to the highest bidder, plus a lien of 15 taels per mow per annum in perpetuity. As the number of proprietors on these terms multiplied, the necessity of having powers to institute police, sanitary and lighting measures made itself felt, and by a proclamation dated March 31, 1897, permission to exercise such powers over a given area was granted by the Chinese Government. Land belonging to Chinese remains the property of the original owners, but they must conform to British municipal regulations, and all transfers of land within that area must be registered at His Britannic Majesty's Consulate. The terms on which land is held in the recent extension, known as the extra mural, are similar, only there the system of feuage does not obtain. It will thus be seen that to reduce matters to uniformity would be a somewhat complicated task. But it is understood that unification would be welcomed by all present holders of land, and that they would concur in any equitable proposals to that end which might be brought forward.

With the consent of the United States authorities, the American concession, which adjoins the British, has been placed under British municipal control, and is administrated in conjunction with its neighbour.

In addition to bund rent and mooring fees, land tax and rental assessment are levied on holders of property by the British municipalities, and, as evidence of the way in which Tientsin has risen like a phœnix from its ashes, an analysis of the Budget for 1903 is instructive. The estimates for 1903, in respect of the original concession, placed the receipts at :—

| | Amount. |
|---|---|
| | Taels. |
| Land tax (quarter of 1 per cent. per mow) .. | 6,300 |
| Rental assessment (5 per cent.) .. .. | 7,700 |
| Total .. .. .. | 14,000 |

A re-valuation of the property having been made, it was found that the value of land had risen from an average of 6,000 taels per mow to an average of 8,000 taels per mow, and the receipts in consequence amounted to :—

| | Amount. |
|---|---|
| | Taels. |
| Land tax .. .. .. .. .. | 8,853 |
| Rental assessment .. .. .. .. | 8,402 |
| Total .. .. .. | 17,255 |

or an excess of 3,250 taels over the estimate.

A reduction accordingly of 15 per cent. was allowed for the year. Similarly the revenue of the extensions, wherein land tax is at the rate of half of 1 per cent. per mow on 1,000 taels per mow, and rental assessment 7½ per cent., the revenue exceeded the estimate by 6,500 taels, and a reduction of 25 per cent. was allowed.

The other items in the receipts column afford additional proof of the extraordinary way in which trade and traffic has increased. In 1899 jinricsha licenses produced 4,000 dol. and trolleys 1,850 dol. ; in 1902 the receipts were 16,300 dol. and 4,500 dol. respectively. In 1893 the tonnage of steamers carrying coal to the British bund was 341,000 tons ; in 1902 it had risen to 547,400 tons.

It is, of course, impossible to say whether or not greater progress would have been made had there been no disturbances in the north, but, looking at things from an outside point of view, it would seem as if the case of Tientsin were analogous to that of an individual, who, after being prostrated with typhoid fever, makes a complete recovery and enters upon life once more, cleared of all noxious humours, with renewed vigour.

Note may be taken in passing of the large earnings of local joint stock companies, whose dividends cannot but give satisfaction to those concerned, mostly residents of Tientsin. When a tug and lighter company declares an occasional dividend at the rate of 174 per cent., and a land investment company, after two years working, can pay 10 per cent., stockholders elsewhere may well feel envious. New banking agencies have established themselves in the port, the wants of the public are in every respect well provided for—it is even possible to communicate with Peking by telephone—

and with the one exception of Shanghai there is no port in China which displays signs of greater affluence than Tientsin. It is gratifying to bear in mind that these results have for the most part been achieved by British enterprise and on British initiative. The pioneers of the port have every reason to be proud of the work they have accomplished in the past.

River conservancy.

In addition to being icebound for three months out of twelve, the port of Tientsin has for years past laboured under the disadvantage of not being able to maintain in a navigable condition its channel of communication with the sea—made up of the waters of the Pei-ho, the Hsi-ho, the Tach'ing-ho and the Grand Canal, whose point of confluence is a little above the native city, and whose united volume is thereafter known as the Hai-ho. The question of dealing, on scientific lines, with the improvement of this waterway is a very old one, because, apart from the interests of trade, the enormous amount of damage caused by the annual overflow of its constituent streams had to be reckoned with. Previous attempts on the part of the territorial authorities to relieve the people from the ever-recurring danger of disastrous floods, by draining off into the Pei-t'ang River through specially constructed canals part of the masses of water which accumulated round Tientsin, while for a time having had the desired effect, are said to have been ultimately responsible for the gradual silting up of the very tortuous course by which the Hai-ho found its way into the Gulf of Pechili. Things went from bad to worse, until in 1896 even tugboats and lighters could not come up to the British bund. It was then felt by all concerned that futile discussion must be abandoned in favour of practical remedial measures, and funds were raised for the construction of locks in the canals. The cost of these was estimated at 250,000 taels, of which the Governor-General gave 100,000 taels, the other three-fifths being defrayed out of the proceeds of a British municipal loan at 6 per cent., secured by a levy of 1 per cent. on the customs duties paid by all merchandise, or ½ per mille *ad valorem*. These locks were on the point of completion when the troubles broke out, but a great deal of damage was done to them subsequently, and the indemnity claimed in respect thereof was 126,000 taels.

The provisional government, on taking over the city, lost no time in devoting its attention to the matter of conservancy; in fact, until the Hai-ho Conservancy Board was constituted in 1901, they assumed control of the works, meeting all necessary expenses. This Board, which consists of three members, a representative of the Chinese Government, the Senior Consul and the Commissioner of Customs, to whom are added, with consultative voice only, representatives of commerce, shipping, and the concessions and settlements, obtained authority to raise in 1902 a second loan of 250,000 taels, guaranteed by an additional levy of ½ per mille on all imports and exports, for the purpose of shortening the river by cutting across the five most difficult bends. Towards the

maintenance of conservancy works the Chinese Government has, in terms of Article XI of the Peace Protocol in 1901, to contribute a sum of 60,000 Haikuan taels per annum.

After the damage to the old works had been repaired, the systematic straightening of the channel was commenced in October, 1901, under the superintendence of Mr. A. de Linde, a Danish engineer, who has been connected with the river improvement schemes since their inception. By December, 1902, the Board was able to report the completion of two cuttings, one $\frac{3}{4}$ of a mile and the other $1\frac{1}{10}$ of a mile long, which have shortened the distance from the bar by $4\frac{2}{5}$ miles, and have enabled steamers drawing 10 feet 6 inches to reach the bund in seven to eight hours. The third cutting, about $2\frac{1}{10}$ miles in length, which has just been commenced, and for which a third loan of 300,000 taels at 7 per cent., guaranteed by yet another levy of $\frac{1}{2}$ per mille on the customs duties, has been raised, will do away with several bad curves and will shorten the distance by $5\frac{1}{4}$ miles. When the two other projected cuttings shall have been completed, the total distance from Tientsin to the sea—originally 51 miles—will have been reduced to 37 miles, and four more rectangular bends will have been circumvented.

Bar works.

There is, however, little object in having a river navigable for vessels drawing 13 feet, if they cannot get over the bar at its mouth on a lower draught than 8 to 10 feet, and the raising of funds to deepen the bar is the next problem which confronts the mercantile and shipping communities. As was pointed out in Mr. Consul Carles' report for 1899, while the river was in process of silting up, the bar extended farther out to sea, and the pecuniary loss incurred by those concerned, through the detention of steamers and the cost of partial lighterage, imposes in the aggregate a very heavy tax on the trade of the port. Northerly and westerly winds in the autumn invariably cause low water, and, although those interested may regard with equanimity the spectacle of six steamers lying there for days at a time (one steamer in December, 1903, lay there, fully laden, 13 days before she could get out), the outsider is at a loss to conceive how such a state of things cannot but affect trade adversely.

A survey of the bar was carried out in July and August, 1902, by H.M.S. "Rambler," and an estimate of the cost of deepening the bar channel to 14 feet calls for an expenditure of 450,000 taels on the purchase of two dredgers, and of 70,000 taels per annum for the cost of dredging and works generally. The bar must be dredged to at least 7 feet below its present level to allow steamers with a 14 feet draught crossing it with a tide of 8 feet. To raise funds for this purpose the sum of 145,000 taels per annum is required, and it is proposed to obtain sanction to levy 15 candareens per ton (net register) on all steamers crossing the bar, and to impose on goods a separate $\frac{1}{2}$ per mille charge, to be devoted exclusively to bar works as distinct from river conservancy. It is understood that the steamer companies trading to Tientsin, with the exception of one company, which is not satisfied that a careful and complete investi-

gation of the question has been made, are willing to agree to a charge of 1 mace per ton, but decline to accede to a levy of the higher amount. The majority of the steamship companies have built steamers specially designed for carrying cargoes on a low draught, and are said to be averse to let all comers in on an equal footing. The company which expressed itself dissatisfied with the preliminary inquiries has its own wharves at Ch'in-wang Tao, and the vested interests of the lighter company, whose earning capacity would be considerably affected could steamers reach the bund at all seasons of the year, have also not to be left out of consideration. It having been previously contended that the navigability of the Hai-ho is a matter concerning the property owners of Tientsin primarily, and these latter having accepted this principle and taken upon themselves a burden of 800,000 taels for river conservancy—to which sum the shipping companies have in no way contributed—surely it follows that the improvement of the bar is primarily to the advantage of the shipping companies. Improved conditions of trade must benefit both carriers and merchants ; low bar tides and low water in the river as a rule go together, but if there is more water on the bar than can be found in the river, the shipping companies can always discharge large steamers at T'angku, without having to fear detention outside. It is the more to their interest to do so, as, when the river was at its worst, large sums of money were invested at T'angku in building wharves and godowns, which, with an improved river but an unimproved bar, would stand empty.

Ch'in-wang Tao.

Whatever improvements may be carried out as regards the Hai-ho and its entrance, there is no getting over the fact that it is completely closed by ice during the winter months, and that for the present the only remaining means of obtaining access to Tientsin for three months of the year is Ch'in-wang Tao.

The Chinese Engineering and Mining Company, which in 1901 was converted into a British joint stock company—with a large proportion of Belgian capital—appears to be doing very well, and there can be no doubt of the fact that it is a great boon for Tientsin to be in communication with the outer world all the year round. The opening of Ch'in-wang Tao has revolutionised the trade of the port. Whereas in the old days there was always a rush to get cargo in and out before the river is closed, followed by a long period of hibernation. shippers can now suit their own convenience, and full use is made of the facilities thus afforded. The wooden pier, 2,000 feet long, constructed by the order of the Allied Admirals and since embedded in stone, affords berthing room accommodation for two to three steamers of 16 feet draught, and the outer breakwater can accommodate as many more up to a draught of 20 feet. Trucks are able to run right alongside, and, as stated above, a branch line connects the harbour with the main railway line. It was originally intended that the breakwater should have a total length of 2,200 feet, but in the month of February last, when 1,700 feet of piling had been

completed, it was found that the piles had been attacked by sea-worm, and this intention was abandoned. It is somewhat curious that the seaworm should exist on that part of the coast, as timber piers at T'angku and Newchuang, constructed of ordinary American pine, have stood securely for years. The Jarrah timber, imported from Western Australia, used in the construction of the breakwater was supposed to be very suitable and comparatively immune from attack, yet the damage done has proceeded so far that the life of the pier can only be a very short one.

The company has an output capacity of 160,000 tons of coal per annum, and this they distribute up and down the coast by means of a fleet of six steamers. Whether or not, years hence, Ch'in-wang Tao will wrest from Tientsin its present commercial supremacy is an open question. But there can be no doubt that the future of both is likely to be very considerably affected by the potentialities of development, consequent upon the gradual penetration into the interior of the iron horse.

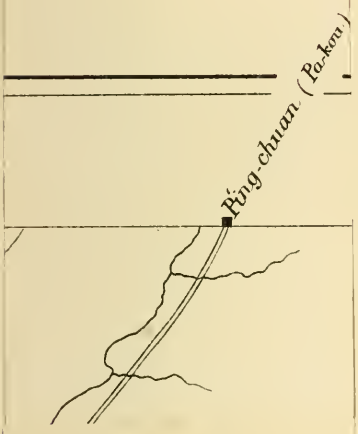
Imperial railways of North China.

After experiencing many vicissitudes at the hands of military administrators of various nationalities, the Imperial railways of North China reverted to their original owners in the course of 1902, and, having since then repaired damages and been thoroughly reorganised, are paying handsomely. While the lines were still under military control the Peking terminus was brought up to the main gate of the Tartar city, and the traveller now finds himself deposited within a few yards of Legation Street. A branch line was built from Peking to T'ungchou, 14 miles away, the head of navigation on the Pei-ho and the former port of Peking, whither in the old days all tribute rice was brought. This rice travels now almost exclusively by rail from the sea direct, but the earnings of this branch have not come up to expectation. It may ere long, however, be carried along the base of the triangle to Ku-yeh (vide sketch of country round Peking) and bring the capital into even more direct touch with the coast.

The somewhat remarkable eagerness displayed by the Court on its return from exile to adopt Western conveniences, led to the building of a line 25½ miles long from Kao-pei-tien, on the Peking–Hankow line, to the Western tombs, so that now His Majesty can perform his sacrificial rites there with the minimum of inconvenience and loss of time. The much discussed extension from Kou-pangtzu—56 miles west of Newchuang—to Hsinmin T'un is now an accomplished fact, and the traffic thereon is said to be large and remunerative. It is 69½ miles in length, but it is unlikely that it will be carried farther by its present owners. The total mileage of the Imperial railways of North China is thus brought up to 580 miles, and extensions of the system by building a chord line from Tientsin to Paoting, and from Feng-t'ai viâ the Nanku pass to Kalgan—100 and 115 miles long respectively—are spoken of. The former would link up the Pei-han line directly with the sea, and might interfere seriously with the traffic earnings of the existing line to Peking.

-LI PROVI

*d, December 1903.*

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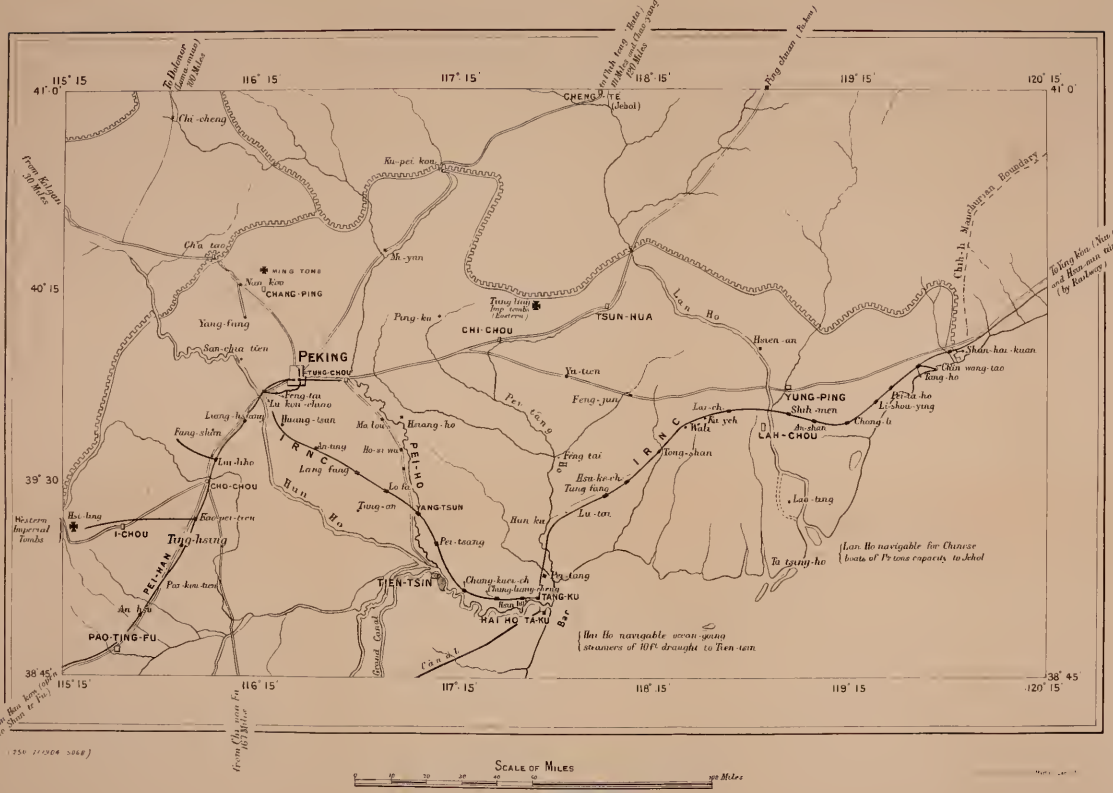
# SKETCH MAP OF NORTH CHIH-LI PROVINCE.

*Compiled in Intelligence Branch North China Command, December 1903.*



(An alternative chord line is to cut across from Chengting to Te-chou on the Tientsin–Chinkiang trunk line.) As Kalgan is just outside the Great Wall on the confines of Mongolia, the latter would bring Tientsin so much nearer to its sources of wool supply, and in the interests of trade expansion its construction ought not to be deferred. In what direction it may then push forward to join the Trans-Siberian trunk line, whether north-westwards viâ Urga to Verkneudinsk, or due north viâ Dolonnor to Khailar remains to be seen.

Belgian and French railways.

Rapid progress has been made in the construction of the Pei-han line, and its two ends ought to meet at Yungtzu on the Yellow River about May of the present year. Like the Imperial railways it suffered damage at the hands of the Boxers, but not to the same extent, and, by way of indirect compensation, it availed itself of the opportunity afforded by the absence of the Chinese Government to shift its terminus from Lu-kou-ch'iao to the main gate of the Tartar city, Peking, where the width of a street only separates the two stations. At the moment of writing it is working down to Shun-te on the borders of Honan, and the formidable task of bridging the Yellow River is to be taken in hand in the spring. When the northern and southern section get in touch with each other, another Belgian group of financiers, known as the "Compagnie Génerale des chemins de fer et tramways," will proceed to carry into operation a concession they obtained on November 12, 1903, for the building of a line from K'ai-feng, the capital of the province of Honan, to Ho-nan fu in the same province. The point of departure will be the above-mentioned Yungtzu, on the south bank of the Yellow River, and the line will strike east to K'ai-feng (52 miles) and west to Honan (84 miles). The whole line has to be completed within two years from date of commencement, and the company has then the option of extending the western branch to Hsian, the capital of Shenhsi. For this purpose a gold loan of 1,000,000*l.* at 5 per cent., guaranteed by the Imperial Government, is to be raised. Eventually K'ai-feng will be connected with Yenchou in Shantung, as, when the Tientsin–Chinkiang line is approaching completion, the Chinese Government has promised to entertain applications for the construction of a line from that town to K'ai-feng. So far, however, no steps have been taken by either the British or German concessionaires to get to work on that very important trunk line, although, as Chinan will be connected with Tsingtao early in the year, one may expect soon to hear of greater activity.

The subscription lists for the loan of 40,000,000 fr. at 5 per cent. for the building of the Cheng-ting–T'ai-yüan railway, a concession obtained by the Russo-Chinese Bank towards the close of 1902, were opened in December, 1903, at 96·50. This line, 125 miles long, starts from a town in Chihli on the Pei-han line, and has to cross a high range, traversing the geological formation known as Loess, in order to reach the capital of Shanhsi, a province hitherto practically closed to the outer world. Its construction will prove by no means easy,

and it is open to doubt if 40,000,000 fr. will cover the cost. It is understood that the proposal of the engineers to make it a mètre gauge line, as being cheaper and more feasible than the ordinary standard gauge, has been accepted by the Imperial Railway Administration. This will naturally cause delay and expense in the transference of goods from one line to the other. The Chinese Government, who guaranteed the loan, have given the bank authority to substitute for themselves a French company, and the right of extension southwards to Hsian.

British railways.

The Peking Syndicate's 80 miles mineral line from Ch'ing-hua to Tao-k'ou, now completed, taps the anthracite deposits of Shanhsi, where they project into Honan, and is intended to bring their output down, by way of the Wei River and the Grand Canal, to Tientsin, or by some route not yet determined to the Yangtzu. In order to realise expectations, it should start from Tse chou, on the Shanhsi plateau, one of the richest coal and iron regions in the world, but the engineering difficulties are great and the cost prohibitive.

Effect of railways in Tientsin.

The obvious question which springs to one's lips is, to what extent will the trade of Tientsin be affected by this network of railways, and in what respect will the far-reaching ramifications, which are bound to be the outcome of any extension of present systems, create a diversion of traffic? The answer, it must be confessed, will be that while for the immediate future the outlook is very bright, it can hardly be contended that, say 20 years hence, Tientsin will have the northern and north-western trade so entirely under control as at present. Her principal area of distribution consists of the province of Chihli, Shanhsi, Shantung and Honan, to which in 1902 she, under transit pass, sent goods valued at 1,849,300*l*., 540,500*l*., 170,750*l*. and 170,720*l*. respectively. Her sources of supply are Mongolia, Hei-lung-chiang, part of Feng-t'ien, Kansu, Shanhsi, Chihli, Northern Honan and Shantung, whence in 1902 she drew produce valued at 1,100,000*l*., and the gold-fields, scattered throughout Mongolia and Manchuria, which used to furnish about one-half of China's annual export of gold. It may be assumed that the Tran-Siberian railway will attract all gold, and furs and skins of large value in small bulk; that part of the supply of Honan goat-skins will be carried down to Hankow direct; that the German railways in Shantung will make every effort to divert exports to Tsingtao; and that a Russian railway from Kalgan viâ Urga to Verkneudinsk will in some measure interfere with wool supplies. The Russo-Chinese Bank has already an agency at Kalgan, proposes to establish itself at Kuei-hua Ch'eng and thence move on to Lan-chou. The financial facilities it can thus afford will throw a share of the trade into its hands, and it will naturally support a Russian undertaking in so far as the state of the markets will permit. Against the opening of Shanhsi by means of the Chengting–T'ai-yüan railway has to be placed the tapping of Shenhsi by means of the K'ai-feng–Hsian line, and an

eventual extension of that line from Hsian to Lan-chou might, under conceivable circumstances, carry all the western wool to Hankow. On the other hand, railways create trade, and, to judge by the limited experience that China has so far gone through, they have developed inland districts in a most unexpected manner. It may therefore be that what Tientsin may lose in her export trade she will gain by an increase of her distributing powers. In this direction again, however, the influence of competing ports such as Newchuang and Tsingtao must make itself felt, even though Tientsin can invoke the aid of the extended system of waterways, by which the province of Chihli is intersected, and over which carriage may be cheaper than by rail. Unfortunately the import trade is mainly pushed by foreign firms or Chinese, the British houses finding export business so profitable that they have little time to devote to less lucrative undertakings.

A great contest for commercial supremacy—be it in imports or in exports—must ensue between Hankow and Tientsin, and as Hankow from her geographical position starts the race with many points in her favour and will in the end be found to be the largest market, Tientsin would do well not to forget that large markets possess large powers of attraction.

Local money market.

Before analysing in detail the import and export returns of Tientsin, an attempt must be made to explain the peculiar condition of the local money market, which has had so disastrous an effect on the import trade of the port, and so entirely dislocated that of Shanghai. One can hardly hope that this endeavour will prove successful, as even amongst the well informed on the spot the greatest divergence of opinion exists, and trustworthy statements of fact it is impossible to obtain.

It has in the first place to be borne in mind that Tientsin's imports of goods, native and foreign, have always largely exceeded her exports of produce—the proportion being roughly in the ratio of eight to two. In the past her exports of gold and the constant stream of money flowing from the provinces to the capital must have been of material assistance in enabling her to meet her obligations. For various reasons the export of gold is steadily declining, and the large sums, which the provinces have to provide for the service of loans and the indemnity, and which they remit to the points of payment direct, have appreciably diminished Peking's revenues.

Prior to the siege the note circulation of the four great metropolitan banks, known as the Hêng banks, amounted to 5,000,000 taels. The note issue now of the three remaining—one having failed in the course of 1902—is said not to exceed 300,000 taels. These notes, owing to the high standing of the banks, were looked upon as equivalent to bullion, as readily current as Bank of England notes, and were largely used as a convenient mode of hoarding wealth. Experience having proved the unwisdom of this method, such men of substance as have money to hoard have substituted

therefor hard cash, preferably gold bars, and this may be one factor explanatory of the decreased gold export. An additional factor is the state of anarchy reigning in the three Manchurian provinces, where the most productive mines are situated. The control and exploitation of these mines has now passed out of Chinese hands and their output is likely to be attracted to the Siberian railway.

As regards Tientsin itself, the Shanhsi banks, who conduct nearly the whole banking business of the Empire, were in the habit of giving very extensive credits to local cash shops, the most reputable of which had a capital rarely exceeding 20,000 taels. The Shanhsi banks were represented by some 20 firms with an aggregate capital of 10,000,000 taels; and when the crash came the amount, said to have been owing to them, is estimated at sums ranging from 11,000,000 to 20,000,000 taels. On the restoration of order they returned to Tientsin and proceeded to collect these outstanding debts, at the same time refusing to grant any renewal of credit. Whatever the estimates of what they were owed may have been, there seems to be a consensus of opinion that they have recovered all but 2,000,000 taels. The withdrawal of credit on their part, and the depletion of silver in the market consequent upon the looting which took place in the course of the military operations, had the result of completely revolutionising the old system of doing business. As in all revolutions chaos must ensue before order can be evolved, the state of collapse in the Tientsin market is attributable to natural causes, and, while for the time being extremely prejudicial to the interests of those trading in that market, need not create undue anxiety for the future.

Formerly purchases were paid for by what were known as "native bank orders," which, when issued by banks of good standing, passed current at par, and were received by the foreign banks as the equivalent of cash. They were of two kinds, one issued against an actual deposit of sycee, payable in full on presentation, and the other a simple transfer order not payable in cash on presentation, but merely entitling the holder to a credit in the bank's books for the amount specified. These notes had a recognised utility in passing from hand to hand in payment of debt, and so long as it was known that the Shanhsi banks stood behind the banks of issue, constituting in fact the ultimate gold reserve—to borrow an illustration from Lombard Street—trade, while not being on a theoretically sound basis, went on satisfactorily. After the Boxer troubles, however, when the banks of standing were practically ruined, and their backers withheld credit, a paper currency of this kind could not be tolerated, more especially as a crop of mushroom banks sprang up, who flooded the market with their notes—not worth the paper on which they were written. The foreign banks accordingly refused to accept these notes, except for collection, and then a period of wildest confusion and dishonest speculation set in, leading, as was to be expected, to complete demoralisation

of the market. This state of things, synchronising with a heavy fall in sterling exchange, is sufficient to explain the paralysis of the import trade. The risky experiment of official interference, which sought, by prohibiting the export of silver and the fixing of arbitrary rates of discount, to clear the air was tried, and needless to say it broke down. The sole remedy was the natural one of allowing matters gradually to right themselves through lapse of time, and pending such rectification to adhere to a demand for payments on a strictly cash basis. Eventually this is what it came to, and the process of re-integration has been going on slowly though surely ever since. Great temporary distress has of course been thereby caused, but the elements of instability and insecurity have been eliminated and a much healthier tone prevails. Banks are getting to know who are their really solvent customers, and, when complete confidence has been restored, the present stringent rule will probably be relaxed under proper guarantees. The Shanhsi bankers cannot well afford to withdraw permanently from so large a field of mercantile operations as Tientsin, and, were they fully assured of non-interference on the part of Government, they would doubtless return.

Reports with regard to scarcity of silver in the north have been greatly exaggerated. Against the wholesale clearances of 1900 have to be placed the enormous sums which have been expended since, and towards the end of December, 1903, the stock of silver was estimated as follows :—

| | Amount. | |
|---|---|---|
| | From | To— |
| | Taels. | Taels. |
| In the— | | |
| Shanhsi banks .. .. .. | 1,000,000 | 2,000,000 |
| Open market .. .. .. | .. | 1,500,000 |
| Official deposits.. .. .. | .. | 1,500,000 |
| Foreign banks .. .. .. | .. | 2,000,000 |
| | Dollars. | Dollars. |
| ,, ,, .. .. .. | 2,000,000 | 3,000,000 |

A much larger amount than suffices to finance Shanghai. If credit be non-existent cash is the only alternative ; but an extension of credit, coupled with a cash reserve of such comparative magnitude, ought to inspire confidence.

Coinage. It is curious to note with what ease the British dollar has entered into circulation in the north, and established itself alongside of the Mexican, whereas the French dollar, intrinsically a finer coin, is only taken at 7 to 10 per cent. discount. The present Governor-General has been instructed to commence the coinage of a national tael, and has rebuilt the Mint and engaged an expert assayer, through

the United States Treasury Department. All that is lacking is the machinery, which is now being ordered from America.

Trade conditions.

One result of the new conditions, under which trade is being carried on, has been to place the native merchant in closer touch with manufacturers abroad. He now asks for quotations in sterling and is mastering the mysteries of exchange, a problem with which he previously did not choose to concern himself. Should he so elect, he can have his purchases shipped to Tientsin direct, as every month a steamer arrives at the bar with railway material and surplus space for other goods. His intercourse with foreigners is facilitated by the fact that the latter almost all possess a knowledge of the language sufficient to carry on a business conversation, an example which merchants at other ports might well follow.

Table A.—Return showing Value of Total Trade of Tientsin during the Years 1899–1902.

| | Value. | | | |
|---|---|---|---|---|
| | 1899. | 1900. | 1901. | 1902. |
| | £ | £ | £ | £ |
| Net total foreign imports .. | 5,912,426 | 2,285,963 | 4,027,392 | 6,947,694 |
| ,, native ,, .. | 3,405,378 | 1,415,332 | 1,779,419 | 2,920,677 |
| Native produce of local origin exported to foreign countries.. | 133,035 | 60,192 | 95,500 | 219,547 |
| Native produce of local origin exported to Chinese ports .. | 2,230,263 | 1,192,863 | 1,406,949 | 1,544,283 |

Table B.—Comparative Table of Imports from Foreign Countries during the Years 1899–1902.

| Country. | Value. | | | |
|---|---|---|---|---|
| | 1899. | 1900. | 1901. | 1902. |
| | £ | £ | £ | £ |
| United Kingdom .. | 547,006 | 119,356 | 127,664 | 565,644 |
| United States of America | 162,111 | 29,509 | 78,198 | 238,946 |
| Continent of Europe (Russia excepted) .. | 109,966 | 76,137 | 260,802 | 367,473 |
| Japan .. .. .. | 726,226 | 169,957 | 85,858 | 712,043 |

Total trade of the port.

As regards Table A it must be remembered that exports to countries other than Japan are for the most part sent to Shanghai (a Chinese port) for transhipment, and attention is called to the large increase shown in Table B of the value of direct imports in 1902 from the United States and Europe over the value of those in 1899. Last year will doubtless show a farther increase. Imports

from and exports to Hong-Kong are not given, as it is impossible to differentiate between the distribution of foreign and native goods in the colony.

Table C (1).—Comparative Table of Principal Articles of Import during the Years 1899–1902.

| Articles. | | Quantity. | | | |
|---|---|---|---|---|---|
| | | 1899. | 1900. | 1901. | 1902. |
| Opium— | | | | | |
| Malwa | Cwts. | 1,424 | 460 | 464 | 415 |
| Patna | ,, | 147 | 76 | 62 | 115 |
| Benares | ,, | ... | ... | 1 | ... |
| Persian | ,, | 7 | ... | ... | ... |
| Boiled | ,, | 21 | 1 | ... | ... |
| Cotton goods— | | | | | |
| Shirtings, grey, plain | Pieces | 1,109,600 | 389,085 | 542,693 | 1,520,978 |
| ,, white ,, | ,, | 637,589 | 293,032 | 324,948 | 841,559 |
| T-cloths | ,, | 221,504 | 93,896 | 58,389 | 241,116 |
| ,, Japanese | ,, | 129,872 | 33,270 | 43,400 | 127,299 |
| Drills, American | ,, | 580,459 | 139,210 | 390,278 | 729,230 |
| Sheetings— | | | | | |
| British | ,, | 37,042 | 30,147 | 15,556 | 22,276 |
| American | ,, | 1,878,395 | 724,005 | 1,031,170 | 2,165,938 |
| Chintzes, furnitures and plain cotton prints | ,, | 297,269 | 237,392 | 66,385 | 322,249 |
| Turkey-red cottons | ,, | 88,360 | 30,031 | 37,127 | 71,334 |
| Cotton lastings | ,, | 132,059 | 78,160 | 52,466 | 212,064 |
| ,, Italians | ,, | 155,973 | 81,293 | 50,789 | 160,875 |
| Handkerchiefs, cotton | Dozen | 67,042 | 35,344 | 27,361 | 59,134 |
| Cotton yarn— | | | | | |
| British | Lbs. | 1,745,733 | 724,400 | 952,133 | 2,564,667 |
| Indian | ,, | 13,733,067 | 3,627,867 | 18,421,600 | 34,277,333 |
| Japanese | ,, | 20,414,933 | 2,795,467 | 7,312,667 | 9,853,200 |
| Chinese | ,, | 4,380,400 | 620,533 | 2,312,800 | 4,732,800 |
| Woollen goods, lastings | Pieces | 14,520 | 6,752 | 2,069 | 6,326 |
| Metals— | | | | | |
| Iron, old | Tons | 5,005 | 1,364 | 291 | 2,925 |
| Steel | ,, | 1,064 | 380 | 103 | 1,040 |
| Quicksilver | Lbs. | 6,000 | 16,933 | 6,400 | 16,133 |
| Sundries— | | | | | |
| Dyes, aniline | Value £ | 70,736 | 38,391 | 22,245 | 25,525 |
| Glass, window | Boxes | 73,332 | 9,440 | 9,405 | 40,510 |
| Matches | Gross | 127,696 | 18,391 | 89,297 | 54,208 |
| ,, Japanese | ,, | 1,981,239 | 941,177 | 2,083,731 | 3,820,439 |
| Mining gear and apparatus | Value £ | 19,300 | 18,694 | 16,569 | 3,229 |
| Needles | Mille | 991,841 | 442,020 | 766,450 | 2,366,595 |
| Oil, kerosene— | | | | | |
| American | Gallons | 1,867,500 | 1,142,640 | 3,536,500 | 4,309,520 |
| Russian | ,, | 5,018,000 | 1,951,000 | 6,592,970 | 6,593,490 |
| Paper, first quality | Cwts. | 19,479 | 5,625 | 14,313 | 19,227 |
| Railway materials | Value £ | 545,897 | 64,209 | 381,312 | 334,898 |
| Seaweed, Japan | Cwts. | 101,380 | 17,613 | 58,361 | 73,716 |
| Silk and cotton ribbons | Value £ | 32,728 | 14,220 | 35,223 | 26,366 |
| Sugar— | | | | | |
| Brown | Cwts. | 243,244 | 89,830 | 177,287 | 489,850 |
| White | ,, | 47,262 | 12,588 | 79,526 | 109,643 |
| Refined | ,, | 161,514 | 43,065 | 103,366 | 185,874 |
| Candy | ,, | 24,532 | 17,760 | 17,863 | 55,664 |

Table C (2).—Return showing Principal Articles of Import from January 1 to November 30, 1903.

| Articles. | | Quantity. |
|---|---|---|
| Opium— | | |
| Malwa .. .. .. .. | Cwts. .. .. | 226 |
| Patna .. .. .. .. | „ .. .. | 87 |
| Shirtings— | | |
| Grey .. .. .. .. | Pieces .. | 615,693 |
| White .. .. .. .. | „ .. | 369,793 |
| Drills— | | |
| British .. .. .. .. | „ .. | 11,324 |
| American .. .. .. | „ .. | 401,908 |
| Dutch .. .. .. .. | „ .. | 54,860 |
| Japanese .. .. .. | „ .. | 52,479 |
| Sheetings— | | |
| British .. .. .. .. | „ .. | 23,655 |
| American .. .. .. | „ .. | 796,278 |
| Japanese .. .. .. | „ .. | 45,404 |
| Handkerchiefs .. .. .. | Dozen .. | 18,996 |
| Cotton yarn— | | |
| British .. .. .. .. | Lbs. .. .. | 299,333 |
| Indian .. .. .. .. | „ .. .. | 16,598,666 |
| Japanese .. .. .. | „ .. .. | 9,387,866 |
| Cotton thread, British .. .. | „ .. .. | 1,784,933 |
| Camlets, British .. .. .. | Pieces .. | 1,586 |
| Lastings, woollen .. .. | „ .. | 6,370 |
| Dyes, aniline .. .. .. | Value . £ | 37,162 |
| Matches .. .. .. .. | Gross .. .. | 2,238,093 |
| Needles .. .. .. .. | Mille .. .. | 669,663 |
| Oil, kerosene— | | |
| American .. .. .. | Gallons .. | 1,693,120 |
| Russian .. .. .. | „ .. | 4,938,550 |
| Lankat .. .. .. .. | „ .. | 894,343 |

Imports.

From the time that Tientsin was thrown open to trade in 1861 until now her foreign imports have exceeded in volume those of the other treaty ports, and that this is only what one need expect, a glance at the map of the large tract of country for which she constitutes the sea gate will show. Central China can draw supplies through many channels, but the north and north-west can, as far as sea-borne goods are concerned, be reached through Tientsin alone.

The magnitude of the trade attracted attention even in the early days, and the heavy tax imposed on it by transhipment—charges at Shanghai and high rates of coast freight—freight and charges Shanghai to Tientsin amounting to 3 per cent. *ad valorem*, against freight from the United Kingdom to Shanghai 1½ per cent. *ad valorem*, led to suggestions that a direct steamship service be instituted. Then, as now, the difficulty is to find return cargoes, and the increasing tonnage of modern carriers has by no means lessened this difficulty.

During the last two years, however, large quantities of railway material have been brought direct to the Taku bar, and for some time to come a monthly service of this kind can be confidently

relied upon. Shippers have not hesitated to avail themselves of the vacant cargo space offering, and a direct trade is gradually springing up, which must eventually affect the distributing capacity of Shanghai. Those concerned at the latter port regard the new departure with perfect equanimity, arguing that buyers must always come to the emporium offering the most varied selection of goods, and that when Tientsin houses are tired of importing unsaleable articles and disposing of them at a loss, the trade will revert to Shanghai. They do not appear to realise that in staple plain goods there is no necessity for selection, and that when a commission house in Tientsin can, by personal communication with an up-country dealer in his own language, ascertain what the requirements of a particular district are, grave errors in the selection of fancy goods are not likely to occur.

It is to be regretted that British merchants in Tientsin are content to leave imports so entirely in the hands of their German and American competitors, and that the control of the trade on the part of the native middleman in Shanghai—who naturally views with disfavour any projects likely to interfere with his profits—is so great.

Opium. The quantity of opium imported in 1899 was greater than at any time since 1894, owing to a failure of the Shanhsi and Honan crops, and the largely decreased import since then is accounted for by the competition of the native article.

Cotton goods. In 1902 the quantities of cotton goods imported considerably exceeded the importations of 1899, a result no doubt due to restored confidence and the necessity of replenishing depleted stocks. The year 1903 on the other hand shows a sad falling-off, the consequence of over-speculation in 1902 and the disorganised state of the money market, to which allusion has already been made. The difference in the quantities re-exported from Shanghai to Tientsin are as follows:—1903 compared with 1899, 2,385,600 pieces; 1903 compared with 1902, 2,226,400 pieces. The bulk of this difference has to be carried by Shanghai and has very seriously hampered business there. Prospects for 1904, however, are good. Stocks in the north are light, cotton has risen in value and is scarce, trade is reviving, as has been pointed out, on a sound basis, and there ought to be no difficulty in effecting a complete clearance in the spring.

Attention is called to the large increase the figures of 1902 show over those of 1899 in respect of American drills and sheetings, grey shirtings, and above all cotton yarn, on which latter article very handsome profits were made.

Woollen goods. In looking back over the reports of earlier years, it is interesting to find the prominence given to the importation of woollen goods into North China from Russia, viâ Kiakhta. The average value thereof in the early sixties was put down at 230,000*l.*, whereas to-day, as far as customs statistics go, they have entirely disappeared,

and their place has been taken by sea-borne goods, having an aggregate value of some 48,250*l.* only.

Sundries. As regards sundry imports, notable increases (figures for 1902) have to be recorded in Japanese matches, needles, kerosene oil and sugar.

Imports at Ch'in-wang Tao. The new feeder of the Tientsin market, Ch'in-wang Tao, must in the consideration of imports not be left out of account, and Table C (3) shows how this trade is progressing.

Table C (3).—RETURN showing Principal Articles of Import viâ Ch'in-wang Tao during the Year 1902, and from January 1 to September 30, 1903.

| Articles. | | Quantity. | |
|---|---|---|---|
| | | 1902. | 1903.* |
| Shirtings— | | | |
| Grey .. .. .. | Pieces .. | 58,785 | 81,686 |
| White .. .. .. | „ .. | 35,379 | 66,870 |
| Drills— | | | |
| British .. .. .. | „ .. | .. | 6,600 |
| American .. .. .. | „ .. | 19,095 | 64,160 |
| Dutch .. .. .. | „ .. | 3,000 | 5,450 |
| Sheetings— | | | |
| British .. .. .. | „ .. | 620 | 2,600 |
| Japanese .. .. .. | „ .. | .. | 1,100 |
| American .. .. .. | „ .. | 132,715 | 109,705 |
| Handkerchiefs .. .. | Dozen .. | 5,500 | 3,047 |
| Cotton yarn— | | | |
| British .. .. .. | Lbs. .. .. | 104,400 | 26,000 |
| Indian .. .. .. | „ .. .. | 1,370,000 | 7,983,000 |
| Japanese .. .. .. | „ .. .. | 282,000 | 1,464,000 |
| Lastings, woollen .. .. | Pieces .. | 100 | 530 |
| Dyes, aniline .. .. . | Value .. £ | 2,220 | 2,500 |
| Needles .. .. .. | Mille .. .. | 70,350 | 82,050 |
| Oil, kerosene— | | | |
| American .. .. .. | Gallons .. | 21,000 | 76,500 |
| Dutch .. .. .. | „ .. | 100,000 | .. |
| Russian .. .. .. | „ .. | 190,000 | .. |

* From January 1 to September 30.

When the depression in the import trade of Tientsin was at its lowest it was felt that the "hinterland" must be drawing its supplies from other sources on the coast, and an agent was sent along the shores of the Gulf of Pechili to make inquiry. Beyond confirming the previously known fact that Northern Shantung imports a negligible quantity of goods through Yang-chia-k'ou—a small town south of the mouth of the Yellow River—nothing new was discovered.

Table D (1).—Comparative Table of Principal Articles of Export during the Years 1899–1902.

| Articles. | | Quantity. | | | |
|---|---|---|---|---|---|
| | | 1899. | 1900. | 1901. | 1902. |
| Almonds* | Cwts. | 8,860 | 4,180 | 12,978 | 12,022 |
| Bristles | Lbs. | 1,853,333 | 1,070,933 | 1,469,333 | 1,975,333 |
| Coal— | | | | | |
| Kaiping* | Tons | 99,143 | 34,139 | 43,295 | 19,165 |
| ,, for steamers use | ,, | 34,595 | 14,165 | 16,169 | 30,154 |
| Dates— | | | | | |
| Black* | Cwts. | 84,071 | 17,207 | 50,554 | 56,327 |
| Red* | ,, | 66,264 | 15,336 | 39,147 | 53,356 |
| Groundnuts* | ,, | 860,891 | 500,095 | 288,710 | 402,859 |
| Horns, deer, young* | Pairs | 4,974 | 4,605 | 4,105 | 3,526 |
| Medicines* | Value £ | 97,005 | 54,928 | 75,820 | 85,663 |
| Skin (fur) rugs, goat | Pieces | 741,311 | 193,112 | 649,140 | 766 025 |
| Skins (furs), goat, untanned | ,, | 2,663,333 | 925,027 | 1,234,740 | 2,714,445 |
| Straw braid— | | | | | |
| White | Lbs. | 1,368,267 | 1,169,867 | 1,597,067 | 1,218,267 |
| Mottled | ,, | 2,846,400 | 2,656,933 | 3,549,467 | 2,765,867 |
| Coloured | ,, | 438,000 | 361,600 | 155,733 | 285,333 |
| Wool— | | | | | |
| Camels' | ,, | 5,456,533 | 2,266,267 | 1,776,267 | 4,485,467 |
| Sheep's | ,, | 29,052,133 | 14,463,867 | 12,333,733 | 22,030,667 |

* Exports to Chinese ports.

Exports.

A reference to the above table shows that the exports from Tientsin to non-Chinese markets are limited in number, and are practically confined to skins and wool. The figures for 1902 closely approximate to those for 1899, but, owing to native dealers holding back supplies in expectation of higher prices, those for 1903 are not likely to yield such good results. In his report for 1899 Mr. Carles has given the history of the export trade of the port, which was entirely built up by the enterprise of British merchants, and of which they have succeeded in retaining some 65 per cent. Whereas the control of British imports is principally left to Chinese, German and American firms, the manipulation of exports, which go almost exclusively to America, is mainly confined to the three British firms who made the first start.

Skins and wool.

Some 40 years ago, when the value of raw cotton exported from Tientsin amounted to two-thirds of the value of the total exports, skins and wool were only remotely thought of. Certainly no one then contemplated that cotton would disappear from the export list, and hopes of future expansion were centred on coal. The fleeces of sheep and the wool of camels, bred far beyond the confines of the 18 provinces, and the skins of goats from Honan and Shanhsi, which are converted into the smart American boot, have gone a long way towards building up the wealth of Tientsin; but, for reasons given above, it would not be wise permanently to rely on a continuance of present supplies. In December, 1903, for instance, goat-skins from Tientsin's area of supply could be bought in Hankow, whither they had been conveyed by rail, at prices which Tientsin could not quote.

Straw braid.

Careless methods of plaiting on the part of producers have killed the straw braid trade, and exporters give it but little atten-

tion. What trade there is is entirely in the hands of one German firm, who appear to control Luton supplies from the north of China.

Bristles and jute.

The trade in bristles, of which the better qualities come from Manchuria, is a steadily growing one, as is that in the comparatively new item, jute—1,785 tons in 1902 against 1,160 tons in 1899.

Mr. Carles has alluded to a curious faculty certain small Chinese towns possess of attracting to themselves special trades, in face of the fact that there is no ostensible reason why a particular trade should go to that particular place. A very good illustration hereof is furnished by Chiao ch'eng, a name constantly recurring in connection with the skin trade. It is a small district city south of T'ai-yüan, the capital of Shanhsi, which in the course of the last few years has become a busy commercial centre, to the great perturbation of a recently arrived magistrate, who has discovered that increased trade means increased cost of living and is therefore bad for the people. What are known as Tientsin lamb-skins are there prepared, the curl being imparted to the fleece by a process of sprinkling with water followed by sharp flicking with a stick.

Recovery of advances in respect of wool.

When the troubles broke out in 1900 the Tientsin export houses had outstanding advances, made to the wool growers in the west in respect of the season's shearing, to the extent of 384,000 taels, which, on the restoration of order, their agents found it impossible to recover. A foreign representative of the firms interested, accompanied by an officer of the Consulate-General, was accordingly sent up to prove to the authorities the genuine nature of the claims and to press for payment. In this they were entirely successful and repayment is being made by instalments. The party went as far west as Hsi-ning, and their appearance had no little moral effect, inasmuch as it demonstrated to the inhabitants of the wilds that not all foreigners had been killed or driven out of Chihli, and that repudiation of obligations is unadvisable. It also enabled them to study the question of supplies on the spot, and it is to be regretted that no report of their journey was drawn up.

The best wool comes from the flocks of the petty chieftains outside of China proper, who only shear their sheep once a year. The clip is therefore longer in staple and freer from dirt than that obtained from Chinese sheep, who are shorn two or three times a year. All attempts to prevent more than the ordinary amount of dirt, which a fleece must collect in the course of its owner's rambles, have proved ineffectual, and wool containing 30 per cent. of " real estate " still continues to be sent down. The cost of carriage is some 11 taels per picul (*1l. 6s.* per cwt.), and there is quite sufficient dust in Tientsin to render it unnecessary, to pay at this rate for the transportation thither of the sand of Central Asia.

The imposition by the United States of the heavy import duty on wool of 4 c. gold per lb., led to its being thoroughly winnowed prior to shipment, and although the quantities recently shipped appear to be less than were shipped say 10 years ago, the actual amount of clean wool which now goes forward is in reality greater.

An important feature in the Tientsin export trade are differential rates of freights, and to these is to be attributed the gradual drawing off to the United States of articles such as bristles, cow-hides, untanned skins and jute, which might otherwise go to the United Kingdom. The normal rate of freight from Shanghai to New York is 1*l.* 5*s.* per ton of 40 cubic feet net, and rates have been quoted as low as 17*s.* 6*d.*, while to London the rate is 2*l.* 5*s.* per ton (less 10 per cent. rebate, refunded about one year after payment of full freight). In making purchases of produce of low value and great bulk, such as above cited, the American merchant thus possesses a very great advantage over his British competitor, and may quite conceivably obtain an undue control over the London market, as, if his cargo fails to find a market in New York, he can readily re-export to London at 7*s.* 6*d.* per ton extra. The merchant, who ships direct to London at 2*l.* 5*s.* less 10 per cent.—2*l.* 0*s.* 6*d.*—per ton net, therefore pays 8*s.* per ton more than the American merchant who ships to New York and then to London, and has in addition the option of two markets. Should the British merchant attempt to ship to London by steamer viâ New York, he would be called upon to sacrifice all his freight rebates in respect of London freights. This very real grievance and hindrance to British trade cannot, it is to be feared, be alleviated or removed by any system of preferential tariffs. Differential freights.

Table D (2).—Return showing Principal Articles of Export viâ Ch'in-wang Tao during the Year 1902, and from January 1 to September 30, 1903.

| Articles. | | Quantity. | |
|---|---|---|---|
| | | 1902. | 1903.* |
| Bristles | Lbs. | 60,300 | 23,600 |
| Dog-skin mats | Pieces | 46,090 | 14,183 |
| Goat-skin rugs | „ | 8,664 | 11,250 |
| Sheep-skin „ | „ | 2,416 | 2,085 |
| Skins— | | | |
| Goat, untanned | „ | 193,140 | 581,054 |
| Sheep „ | „ | 10,393 | 125,556 |
| Lamb-skins | „ | 1,657 | 2,177 |
| Marmot-skins | „ | 1,050 | 133,683 |
| Wool— | | | |
| Camels' | Lbs. | 79,600 | 563,600 |
| Sheep's | „ | 558,400 | 3,505,600 |
| Hides | Cwts. | 300 | 490 |

* From January 1 to September 30.

As regards native exports to other ports in China, dates and groundnuts have not reached the figures of 1899, but liquorice has jumped from 10,000 to 35,700 cwts. Native export

Table E.—Return showing Re-exports of Tea to Russia and Siberia during the Years 1899–1902.

| | Quantity. | | | |
|---|---|---|---|---|
| | 1899. | 1900. | 1901. | 1902. |
| | Lbs. | Lbs. | Lbs. | Lbs. |
| Tea— | | | | |
| Black .. .. .. | 26,285,867 | 171,733 | 2,361,867 | 7,304,933 |
| Brick, black .. .. | 40,285,067 | 7,450,533 | 10,799,600 | 36,701,600 |
| „ green .. .. | 4,347,467 | 620,267 | 3,224,733 | 6,191,600 |
| Tablet .. .. | 784,533 | 75,867 | 432,933 | 695,067 |

Considering the opposition of the Siberian railway, it is somewhat surprising to find re-exports of tea to Russia and Siberia going forward in such quantities.

Table F.—Net Export of Treasure during the Years 1899–1902.

| Year. | Value. | |
|---|---|---|
| | Gold. | Silver. |
| | £ | £ |
| 1899 .. .. .. .. | 683,086 | 561,903 |
| 1900 .. .. .. .. | 368,089 | 368,605 |
| 1901 .. .. .. .. | 417,575 | 71,404* |
| 1902 .. .. .. .. | 593,116 | 890,287 |

* Net imports.

The treasure returns can only be taken as approximate, because, in many instances, the movements of bullion do not come within the cognisance of the customs.

Inland transit.

During the 40 years of Tientsin's existence as a treaty port, no transit passes, except for Shanghai spun yarn, which under special rules passes free into the interior, were issued by the Maritime Customs, and comparative figures are therefore not obtainable. It was only in 1901 that the system in vogue at other ports was partially introduced, and it is hoped that an unification of existing systems will soon be obtained, and that the issue of passes by the native customs will cease. The latter used formerly to have a monopoly of passes for all outward goods, but Hong-Kong refined sugar was the only article on the import list which availed itself of transit privileges. In 1902 produce valued at 1,082,315*l.* was brought down from the interior, and the goods sent into the interior under transit pass were valued at 2,696,550*l.* Of these 68½ per cent. were for Chihli, 16 per cent. for Shanhsi, 6 per cent. each for Shantung and Honan, 2 per cent. for Kansu, and the rest for Shenhsi, Fengt'ien,

Turkestan and Mongolia. The increased use of the transit pass would seem to argue the imposition, since the troubles, of likin charges, previously unknown, and of the fact that railways have materially facilitated the levy of such charges there can be no doubt. All goods carried by rail to Peking, for instance, are stopped in an inclosure outside of both railway stations, and none are permitted to leave until full octroi dues have been paid.

Canals.

It is not perhaps generally known to what an extent the province of Chihli is intersected by navigable waterways, of which the chief is the Grand Canal. Of its affluents the most important is the Wei River, which is navigable far into Northern Honan, and by means of which the Peking Syndicate proposes to distribute its output of coal. Others are the Tzu-ya River, navigable for boats carrying 3 tons to a point beyond Heng-Shui, and its tributary the P'u t'o, navigable for craft of similar burden to beyond Chengting. By means of the Ta-ch'ing River junks of 6 tons burden can reach Pao-ting, and although it has a strong competitor in the railway the Pai-ho is still made use of. Boats carrying 6 tons can get up the Luan River as far as Luan chou, and carriers of 3 tons can reach San-chia-k'ou on the San-ho. In addition to natural waterways there are numerous canals, dug for drainage or military purposes, which connect important points, so that almost every town in the province is, or will shortly be, in communication with Tientsin, either by rail or by water.

Customs revenue.

Although the native customs have not yet passed entirely under the control of the Maritime Customs, they are being administered under European supervision, and the receipts are reported to be most satisfactory. Duty on native goods is levied at one-half the Maritime Customs rate and likin at the rate of one-quarter of the same tariff. Maritime import duties in 1902 were more than double those collected in 1899, and it is anticipated that the dual collection of 1903 will, in spite of a largely decreased trade, suffice to furnish the whole of Chihli's contribution towards the service of the indemnity and leave a very handsome surplus into the bargain.

The total duties collected by the Maritime Customs in 1902 amounted to 298,267*l.*, and the revenue of the native customs from August 11 to December 29, 1902, was 68,787*l.* The collection of 1899 was 190,470*l.*, which at the time constituted a record.

Shipping.

The following are the figures connected with shipping, entered and cleared, for 1901 and 1902; complete records for 1900 do not exist:—

ENTERED

| Year. | Steam. | | Sailing. | | Total. | |
|---|---|---|---|---|---|---|
| | Number of Vessels. | Tons. | Number of Vessels. | Tons. | Number of Vessels. | Tons. |
| 1901 .. .. | 698 | 661,617 | 5 | 3,087 | 703 | 664,704 |
| 1902 .. .. | 832 | 821,979 | 4 | 2,073 | 836 | 824,052 |

CLEARED.

| Year. | Steam. | | Sailing. | | Total. | |
|---|---|---|---|---|---|---|
| | Number of Vessels. | Tons. | Number of Vessels. | Tons. | Number of Vessels. | Tons. |
| 1901 .. .. | 685 | 655,717 | 4 | 2,686 | 689 | 658,403 |
| 1902 .. .. | 825 | 821,705 | 4 | 2,073 | 829 | 823,778 |

Although the number of vessels entered in 1902 was less by 10 than the total in 1899, the tonnage increased by 32,173 tons.

The share taken by each flag is shown in the accompanying table :—

| Nationality. | Number of Vessels. | Quantity. | Percentage. |
|---|---|---|---|
| | | Tons. | |
| British .. .. . | 338 | 373,086 | 45·27 |
| American .. .. .. | 3 | 2,637 | 0·32 |
| German .. .. .. | 58 | 50,115 | 6 08 |
| French .. .. .. | 2 | 3,000 | 0·36 |
| Danish .. .. .. | 2 | 4,676 | 0·57 |
| Norwegian .. .. .. | 20 | 17,421 | 2·12 |
| Russian .. .. .. | 5 | 2,305 | 0·28 |
| Japanese .. .. .. | 177 | 151,558 | 18·39 |
| Chinese .. .. .. | 231 | 219,254 | 26·61 |
| Total .. .. | 836 | 824,052 | .. |

As at most other ports by far the greatest advance has been made by the Japanese, who in 1899 had only 66 vessels with a tonnage of 66,265 tons (1902 : 177 vessels, 151,558 tons).

General. A waterworks company was formed in the British concession in 1899, and the waterworks in the native city, started by the Tientsin provisional government and completed by the Chinese

authorities at a cost of 410,000 taels, were opened on April 4, 1902. They supply the city with water at the rate of 300,000 to 400,000 gallons a month, and will doubtless find more and more customers as time goes on. The French concession is lit by electricity and the British concession is preparing to follow suit. So far the native city is lit by oil lamps only.

While in power, the Tientsin provisional government gave to a Belgian company the right of constructing a tramway to connect the settlements with the city. The mileage was roughly 18 miles and the lease was for 75 years, but the Governor-General having since refused to ratify the contract, negotiations have fallen through. Such a line must be built sooner or later, as must a line from the city to the Tientsin City railway station; and, had the Governor-General more funds at his disposal, he would not hesitate to introduce farther improvements. At his instance a wealthy Chinese is erecting a mill to weave woollen cloth for army use, and alongside of it is a tannery to tan leather for military accoutrements.

When once the local money market has completely recovered itself it is not unreasonable to assume that a demand for machinery will set in, as already many inquiries are being made. Coal-fields in Western Chihli are being tapped by a German firm, working some 30 miles west of Huai-lu on the borders of Shanhsi; Honan wants flour mills, and altogether future prospects are bright.

One of the principal shipping companies, trading to Tientsin, is about to break down the monopoly of the Taku Tug and Lighter Company by acquiring a fleet of tugs (3) and lighters (16) of its own.

The strength of the garrisons maintained by the Foreign Powers at various points in Chihli to guard the approaches to the capital amounts to 8,500 men, of whom 1,860 are stationed in Peking and 3,600 at Tientsin. Each nationality has its own system of field telegraphs—the Italians having a Marconi apparatus operating from Peking to Taku—and the submarine cable, which was laid in 1900 between Chefoo and Taku, forms a more efficient means of communication with the outside world than the Chinese land lines. There are military guards at every railway station, and it may safely be predicted that the progress of Tientsin will not again be so rudely interfered with as it was three years ago.

It is matter of regret to find that the remnants of the rabble, which followed in the wake of the Expeditionary Forces, are being augmented by the immigration of undesirable nondescripts, who have filtered through from Siberia and Manchuria, and appear to have found a happy hunting ground on the various new settlements, greatly to the detriment of the repute of Western civilisation.

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